

Meets Requirement: Yes _____ No _____

Description (if any): _____

6.8 Card Issuance and PIN Selection

A magnetic stripe EBT card will be issued to each recipient, AR, Protective Payee, and/or designated adult household member. In the event that there is more than one cardholder for an account, each card shall have a separate PAN and PIN. The State will use a combination of over-the-counter and mail based card issuance methods.

Counties will determine when cards will be issued to recipients. Card issuance will occur either prior to or after final eligibility determination depending on county operational procedures.

Meets Requirement: Yes _____ No _____

Reference Document: _____ Page(s) _____

Description: _____

6.8.1 Conversion

County Option: For conversion from paper based benefit issuance to EBT, each county shall have the option to use an over-the-counter conversion methodology or a mail-based conversion methodology. (Except Los Angeles County, see Section 6.8.1.2.5).

Conversion pricing must be shown in Section 7, Schedule 1c.

Meets Requirement: Yes _____ No _____

Reference Document: _____ Page(s) _____

Description: _____

6.8.1.1 Over-the-Counter Conversion

For counties that choose the over-the-counter conversion option, the Contractor shall issue cards over-the-counter at county designated locations (except for homebound recipients who shall receive a card and PIN in the mail). During conversion, the Contractor shall mail a training package to each designated cardholder containing a prescheduled appointment to report to a card issuance location to receive his or her EBT card and select a PIN. Evening and weekend appointments shall be available to accommodate working recipients' schedules.

Enclosed instructions shall inform recipients of the right to reschedule the appointment time and date in the event of emergency or other unavoidable scheduling conflict. (For additional information on training, refer to Section 6.9). At the time of card issuance, the recipient shall swipe the card through a PIN selection device to select a PIN and activate the card. At that time, face-to-face training using demonstration POS equipment shall be available to any cardholder

who requests it or who is identified as having special needs (e.g. visually impaired, illiterate, seriously ill, elderly, mentally/emotionally disabled).

The county shall determine if card issuance activities will occur in the county offices or at an off-site location. If the county chooses not to use welfare department locations for card issuance, the county will secure appropriate site(s) for conversion activities. The Proposal shall specify the site requirements and telecommunications requirements for card issuance activities at three levels of card issuance activity: 1) A low volume card issuance site suitable for small counties with caseloads less than 2,000 cases, such as Calaveras with 1,407 cases; 2) A medium volume card issuance site suitable for medium counties with caseloads between 2,000 and 10,000 cases, such as San Mateo with 6,237 cases; and 3) A high volume card issuance site suitable for large counties with caseloads greater than 10,000 cases, such as Contra Costa with 21,092 cases.

Card issuance site and telecommunications requirements provided by Bidders shall include, but not be limited to: 1) Square footage requirements; 2) Office layout requirements; 3) Furniture requirements; 4) Electrical outlet and electrical capacity requirements; 5) Equipment connectivity and telecommunications requirements; 6) Client access requirements; 7) As-needed, face-to-face recipient training requirements; 8) Storage requirements; and 9) Security requirements.

For each set of card issuance site and telecommunications requirements required above (low, medium and high volume sites), Bidder shall provide the estimated number of recipients processed per hour and the estimated number of Contractor conversion staff, Contractor training staff and county conversion support staff required.

Working with the county, the Contractor shall develop a schedule for card issuance and PIN selection, designed to control the flow of individuals and track attendance. The Contractor shall provide the county with a report of those recipients who did not attend their scheduled appointment within three (3) days of the missed appointment. At the time of card issuance, the Contractor shall ensure that the individual receiving the card provides valid identification and signs for the receipt of the card.

Meets Requirement: Yes _____ No _____

Reference Document: _____ Page(s) _____

Description: _____

6.8.1.2 Mail-Based Conversion

For counties that choose the mail-based conversion option, the Contractor shall mail cards and PINs to recipients. The cards shall be mailed activated. Pre-assigned PINs shall be mailed two to three days after the mailing of the cards. It is critical that recipients receive information on the conversion methodology prior to card and PIN mailings.

Meets Requirement: Yes _____ No _____

Reference Document: _____ Page(s) _____

Description: _____

6.8.1.2.1 Training Support via the Automated Response Unit

For counties using mail-based conversion a toll-free training support number, separate from the statewide customer service center number, shall provide recipient training assistance through an ARU function 24 hours per day, seven days per week during the conversion period. The ARU shall address the most important topics to assist a cardholder in using the EBT System. The ARU shall provide instructions on topics such as:

- How to obtain face-to-face training if desired
- How to perform a Food Stamp transaction
- How to perform a cash transaction
- Card and PIN care and usage
- Benefit availability date
- How to conduct a balance inquiry
- Where EBT cards may be used
- How to report a lost, stolen or damaged card
- Card and PIN replacement

Recipients shall be able to call the Training ARU from pay phones, according to the requirements of Section 6.11.2.1. The Training ARU shall be in the ten languages required in Section 6.11.2.2. The State must review and approve all ARU messages in all required languages before they are used on the system. The Contractor shall not change ARU messages or menu functions without prior approval of the State. The training ARU shall meet performance standards that are customary for such lines in the EBT industry.

Meets Requirement: Yes _____ No _____

Reference Document: _____ Page(s) _____

Description: _____

6.8.1.2.2 Walk-in Training Centers

The Contractor shall provide staff for recipient walk-in training centers to support conversion activities. Recipients will self-select to visit the training centers for the purpose of obtaining training materials, viewing a training video, practicing a POS transaction, or receiving face-to-face instruction.

Counties are responsible for securing facilities for the walk-in training locations. Additionally, counties will provide storage, furniture, phone and electrical line installation. The number of walk in training centers will vary from county to county. Proposals shall address the walk-in training center requirements (e.g., square footage, furniture, equipment, electrical outlets, phone lines, recipient capacity, etc.).

Training centers will be open for approximately three (3) months in each geographic implementation region. Training centers shall open to serve recipients concurrent with card mailings. Training centers will be operated on a staggered basis consistent with county implementation schedules, and shall provide for evening and weekend hours to accommodate working recipients' schedules.

Meets Requirement: Yes _____ No _____

Reference Document: _____ Page(s) _____

Description: _____

6.8.1.2.3 *Recipient Notice*

For the first EBT benefit cycle, the Contractor shall mail a notice to recipients that have not accessed accounts for ten (10) days after the benefit availability date. The notice shall advise recipients that a card and PIN were previously mailed and to call the customer service center for assistance or to contact their eligibility worker if there is a problem.

Meets Requirement: Yes _____ No _____

Reference Document: _____ Page(s) _____

Description: _____

6.8.1.2.4 *Conversion Report*

For the first EBT benefit cycle, the Contractor shall produce a report listing recipient accounts that have not been accessed for thirty (30) days after benefit availability date. This report shall be distributed to the county, sorted by eligibility worker and case number.

Meets Requirement: Yes _____ No _____

Reference Document: _____ Page(s) _____

Description: _____

6.8.1.2.5 *Los Angeles County*

The Contractor shall convert Los Angeles County to EBT using mail-based conversion as described in Sections 6.8.1.2 – 6.8.1.2.4.

Meets Requirement: Yes _____ No _____

Reference Document: _____ Page(s) _____

Description: _____